

10.0 Award Proposal Evaluation Focus Team

Scope: To determine and prioritize functional requirements for the Award Proposal Evaluation process. Also to identify management issues and recommend interfaces and screens.

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Primary Requirements:

- The following documents requested in RFP to be automatically inserted:
Form 620, REPS/CERTS, FOCI, BID Form, Acknowledgment Amendments

Interfaces:

- Interface with pre-solicitation stage
- Link with Vendor Database
- All Forms/Documents Online
- SPs Online

Management Issues:

- Proposals proprietary information/sensitive data
- Forms need to be combined into one form (e.g. Reps and CERTS)
- Sensitive Data especially regarding price analysis
- Are electronic signatures going to be used on contracts?
- How much is going to be paperless?
- What needs to be kept in files?
- Interfaces between electronic and hard files.

Screen 1

PR#	
# of Proposals Received	
Proposals Received From	Link to vendor database?
Proposals Received Date	
Type of Contract	
	Link to solicitation
List of Documents	Link to pre-solicitation
(documents requested in RFP automatically inserted on this screen)	

Forms Requested in RFP	Complete	Signed
Form 620	Y/N	Y/N
RESP/CERTS	Y/N	Y/N
FOCI	Y/N	Y/N
BID Form	Y/N	Y/N
Acknowledge Amendments	Y/N	Y/N

Screen 2

TECHNICAL EVALUATION/SOLE SOURCE
Date Requested _____ (Automatic Insert)
Date Needed _____ (Calendar Insert)
Anticipated Completion Date _____ (Calendar Insert)
Received _____ (Calendar Insert)
* Tracking Notification <u>XX</u> days from due date

CATEGORIES (add categories)	PROPOSAL	RECOMMENDED
Direct Labor		
Material		
Equipment		
Rates/Hours		
ODC		
GFP/GPP		
Travel		
# of trips		
duration OD trips		
# of travelers		

Needs:

1. Narrative text to support recommendations
2. Online instructions for completion (e.g., Technical Evaluation Handbook)
3. E-mail to buyers, cost price analyst, etc.

Screen 3

TECHNICAL EVALUATION/SOLE SOURCE
Date Requested _____ (Automatic Insert)
Date Needed _____ (Calendar Insert)
Anticipated Completion Date _____ (Calendar Insert)
Received _____ (Calendar Insert)
* Tracking Notification <u>XX</u> days from due date

TECHNICAL REQUEST FORM
List Proposals _____ (Link to Proposal Receipt)
Guidelines _____ (Sample - Narrative)
(Capability to Customize)
Definitions/Terms
Evaluation Criteria _____ Link to Pre-Solicitation
Criteria _____ Customize Evaluation
Certificates of Confidentiality/COI
Signed _____ Y/N _____ (online signature capability)
Changes/Members _____ Y/N _____ (Certificate Y/N)
1. E-mail to requesters, committee members
(Password-Protected E-mail)

Screen 4

COMMITTEE TECHNICAL EVALUATION FORM	Help
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TECHNICAL

Evaluation

Recommendation

List of Offerors
 Link to Proposal Receipt
 Technical Rank
 Strengths, Weaknesses, Deficiencies
 each offeror
 Narrative - (Text) Needs to track
 to evaluation
 criteria/scoring matrix

COST

Cost Realism
 Reasonableness

Help AWARD RECOMMENDATION SOURCE SELECTION DETERMINATION <p style="text-align: center;">⇓</p> Customize to evaluation criteria
--

Forward to Source Selection
 Official

COMPETITIVE RANGE* (Template) BEST VALUE* BEST AND FINAL* <div style="text-align: right;"> RECOMMENDATION REQUEST DATE (Calendar Insert)* APPROVAL DATE (Calendar Insert)* </div>

*Tracking Notification XX days from request
 date
 Automatic Transfer of Information from
 Technical Recommendation

Screen 5

PRICE ANALYSIS

HISTORICAL (previous purchases)	Link
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(By vendor, commodity, product, model #,
PO#)

BID ABSTRACT bid abstract data)	Link (previous
---	-----------------------

(By vendor, commodity, government
estimates)

INDEXES (ECI, CPI)	Link
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PROPOSAL RECEIPT Proposal Prices/Offerors	Link
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Calculate:

Percentage Differences

Comparison (Current Price/Past
Prices/Indexes)

Report Form

Forward to File Documentation

Completion Dates



Calendar

Screen 6

COST ANALYSIS (REQUIRED OVER \$500K)

DATE REQUESTED _____ _____ (Automatic Insert) DATE NEEDED _____ (Calendar Insert)* ANTICIPATED COMPLETION DATE (Calendar Insert)* RECEIVED _____ _____(Calendar Insert)
--

*Tracking Notification XX days from due date

HISTORICAL

Link Historical/Current Proposal by Offeror

CATEGORIES ↓ (add categories)	PROPOSAL	RECOMMENDED
Direct Labor Link Payroll • Labor Rates Link Indices • Labor Hours Material Equipment Rates/hours ODC GFP/GPP Travel #of trips Link FTR duration Link OAG # of travelers Subcontractors Low Tier * Overhead Rates/On-site/Off-site NMGR ↓ In-State Out-State Link to County Rates		

*Form within Form/needs to link to Prime/Could be multi-level

Screen 7

NEGOTIATION OBJECTIVES

TECHNICAL EVALUATION RECEIVED

_____ (Automatic Insert)

COST/PRICE RECEIVED

_____ (Automatic Insert)*

NEGOTIATION SCHEDULE

DATE _____ (Calendar Insert)*

APPROVAL DATE

RECEIVED _____ (Calendar

Insert)

*Tracking Notification XX days from due date

FORWARD FOR APPROVAL ↓

(Automatic Date Insert

Team Leader

Peer Review

Weighted Guidelines (Help)

Historical Link to

Previous by Vendor, PO#, Fee,

Contract Type

On-Line Access

FAR

SP/SI

ASPM

WWW

Calculation:

Narrative Justification (Text)

Cost Elements ↓	Proposal	Recommendation	Objective/Position	Negotiation
	Link to Proposal Data	Link to Cost/Price Link to Technical Eval	Calculation Link to Proposal, Wt. Guideline, C/P Recommendation, Technical Evaluation, T&C	Buyer Input Link to Historical, Update Link to Cost Analyst Link to Negotiation Memo

Screen 8

COST/PRICE FORM

DATE

Calendar Insert

To:



Buyers

From:



Price Analysts

Letter #

Subject:



Introduction

Narrative

Text

Scope

Narrative

Text

Special Considerations

Narrative

Text

Conclusion

Narrative

Text

Disposition of Negotiation

Narrative

Text

Spreadsheet Capability
(Multi-year)

Notes

Narrative

Text



Customize Cost Elements

- Labor
- Material, etc.

Screen 9

SEALED BID

BID ABSTRACT (Form Attached)

Link to
Proposal Receipt List of
Offerors

⇓ Calendar
Insert

- Capability for options/additive alternatives
- Signature Capability

EVALUATION REVIEW

Forms	COMPLETE	SIGNED
BID Form	Y/N	Y/N
REPS/CERTS	Y/N	Y/N
Acknowledge Amendments	Y/N	Y/N
Government Estimate	Y/N	

GOVERNMENT ESTIMATE JUSTIFICATION

E-MAIL



REQUESTERS

PRE-AWARD SURVEY

(on-line forms)

Short Form

⇓ Calendar Insert

Long Form

⇓ Calendar Insert



On-line Signature

AWARD

RECOMMENDATION

⇓ Calendar Insert

LEGAL REVIEW

⇓ Calendar Insert

Screen 10

FILE DOCUMENTATION

< \$100K
 FORM 606 ON-
LINE

\$100K - \$500K FORM 606
WITH PRICE NARRATIVE

> \$500K
 NEGOTIATION
MEMORANDUM



SP 4.3 TEMPLATE
CONGRESSIONAL NOTIFICATION (automatic)
EEO
SUBCONTRACTING PLAN

APPROVAL

ESH APPROVAL
FOCI APPROVAL
CONTRACT DOCUMENT (automatic)

INTERFACES:

1. FORMS ON-LINE
2. SP's ON-LINE

Screen 11

REVIEW

PROCESS

PEER REVIEW

↓ Calendar Insert

REVIEW

TEAM LEADER

↓ Calendar Insert

LEGAL REVIEW

↓ Calendar Insert

CRB REVIEW

↓ Calendar Insert

SEE PR REQUIREMENTS SUB-
SCREEN - APPROVAL
CONSIDERATIONS

Screen 12

AWARD

**CONGRESSIONAL
NOTIFICATION (2 DAY)**

AWARD LETTER

Link to
Proposal Receipt Data
↓
Merge Document

CONTRACT

↓ Insert
Date/Approval

Insert Signature

PROPERTY

↓ Shipping
Manifest

Subcontract Appendix

**NOTIFICATION TO
UNSUCCESSFUL OFFERORS**

Link to
Proposal Receipt Data
↓ Merge
Document

**OED
(Eliminate)**